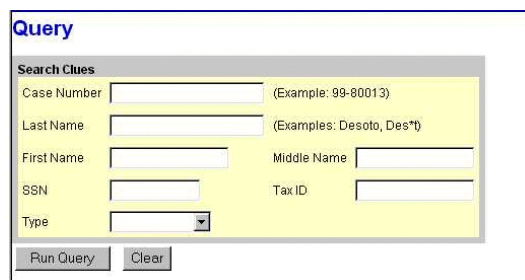

Queries, Reports and Utilities

Query

Query is one of the menu items on the blue banner Main Menu that appears immediately after a user logs in. A user can search for a particular case or adversary proceeding by its number or search for a case or cases that an individual or other entity has appeared. You can find the case by case number, **OR** the name of a participant, **OR** name and type of a participant, their Social Security Number or Tax ID.



Query

Search Clues

Case Number (Example: 99-80013)

Last Name (Examples: Desoto, Des*t)

First Name Middle Name

SSN Tax ID

Type

Search Clues Screen

- Step 1** To Search by **Case Number**, click the case number field and enter the number (yy-nnnnn) or (yy-nnnn) including the hyphen.
- Click on **Run Query** to continue or **Clear** to reselect the criteria.
- Step 2** To search by **Party Name**, click in the **Last Name**, **First Name** and **Middle Name** fields, filling in the appropriate information.
- To further limit the name search, select a specific party type from the drop down box in the field **Type**.
 - When you have entered all of the search clues you wish to add, click **Run Query** to continue or **Clear** to reselect the criteria.
- Step 3** The **Select a Case** screen appears listing the case number(s) and associated party name(s). To view case information, click on the case number hyperlink and the Query menu appears.
- Step 4** The following information can be displayed for a selected case.
- Alias** - All aliases associated with the debtor(s).

- **Associated Cases** - Displays other bankruptcy cases or adversary proceedings associated with the specific case, if any.
Note: Closed Adversary Proceedings will **NOT** display.
- **Attorney** - Displays attorney(s) associated with the case.
- **Case Summary** - Displays a summary of case information to include filed, discharged, or dismissed dates, debtor and attorney name(s), and other information.
- **Creditor** - Displays the creditors in the case.
- **Deadlines/Hearings** - Displays deadlines/hearings set in a case. Report has several sort features, a hyperlink to the actual PDF document and a radio button to related filings.
- **Docket Report** - Displays the case docket. Has multiple sorting criteria, to include by File Date or Entered on the Docket Date. You may print the docket report that is displayed.
- **Filers** - Displays a List of Entities who have filed something in the case (*Not including those who have only filed claims*) and the date they were added.
- **History/Documents** - Displays Listing of Entries/Documents created in a case, with sorting options and hyperlinking to text.
- **Notice of Bankruptcy Case Filing** - Displays a Notice of Electronic Case Filing with date time and court seal. This notice can be printed.
- **Party** - Displays all parties associated with the case.
- **Related Transactions** - Displays case transactions in a box and any other transactions to which it is related (*linked*). The user may sort using various features such as dates filed, document number or type, pending or terminated.
- **Status** - Displays most current case status.
- **Trustee** - Displays case trustee.

Step 5

Click on the desired hyperlink to continue.

Step 6 To print report, click on **Print** button from the browser toolbar.

Reports

Reports is another menu item on the blue banner Main Menu. A non-court user can access the Cases, Claims Register, Docket report, Calendar Events and Creditor Mailing Matrix. The selection criteria for each of these reports are explained on the help screen that can be accessed by clicking on the yellow question mark.

IMPORTANT NOTE

Users are cautioned that reports that cover long periods of time could include dozens, if not hundreds, of pages. Because there is now a per page charge for accessing reports and documents in ECF (*charged whether or not the user prints the report or document*), a user is well advised to enter selection criteria carefully.

Cases Report

Displays cases filed, entered, discharged, dismissed, closed or converted.

Step 1 Select **Reports** from the Main Menu, click on **Cases** hyperlink from the Reports menu. The **Selection Criteria** screen appears and allows the user to specify what information to include in the report.

Note: If you are not already logged into PACER, you will be asked to enter your PACER login and password to view case information.

Selection Criteria include:

- **Office** - Boston (1), Worcester (4), to select both, press down on the Ctrl Key and click on both or leave it blank and both offices will be selected or if you prefer.
- **Case Type** - **bk** for Bankruptcy, **ap** for Adversary Proceeding, and **mp** for Miscellaneous Proceeding.
- **Chapter** - Select and click on the correct chapter.

- **Trustee** - Select and click on the specific trustee.

Note: You may leave the above fields blank to search on all items that appear in that field. To select two or more items in a field, press the Control Key (Ctrl) and click on each item to be included.

- **Date Type** - You may select a Date type which can be the filing date, the date the case is entered by the court, the discharge, dismissed, closed or converted dates. **Click** on the down arrow V and select from the pick list .
- **From** - Click in the box and type in a start and end date for the report to display.
- **Open Cases** - Click in the box to deselect open cases, if applicable.
- **Closed Cases** - Click in the box to select closed cases, if applicable.
- **Party Information** - Click in the box to have the report display party information (i.e., address, tax id), if applicable.
- **Sort by** - Allowed three boxes in which to select criteria for the report to sort, click down arrow V to right of field for list.

Step 2 Click on **Run Report** to continue or **Clear** to re-select criteria. Case Report screen appears.

Step 3 To view case information, click on the case number hyperlink to access **Query** menu. *(Proceed to Query section of this manual for specific information on each query option.)*

Step 4 To print report, click on **Print** button from the browser toolbar.

Claims Register

The Claims Register Report displays the claims filed for a specific case.

Step 1 Select **Reports** from the Main Menu, click on Claims Register Report hyperlink from the Reports menu. The **Selection Criteria** screen appears and allows the user to specify what information to include in the report.

Note: If you are not already logged into PACER, you will be asked to enter your PACER login and password to view case information.

Selection Criteria include:

- **Case Number** - Click in the box and enter the correct case number (yy-nnnnn) including the hyphen.
- **Office** - leave blank as the report will run using the case number
- **Creditor Type** - leave blank, all creditors are uploaded to a case as a creditor.
- **Creditor Number** - leave blank to bring up all creditors who have filed a claim or click in the box and type a specific creditor name. *(You do not have to enter the entire name, the system will search for the first letter of a creditor's name, i.e., "I" will display Internal Revenue Service or IRS. If you type the entire name, only exact matches will be displayed. Leaving the field partially blank will provide the most thorough search.)*
- **Claims Number** - leave blank to display all claims that fall within other search criteria or click in the boxes and type specific claim numbers.
- **Display by Filing Date** - Click the radio button **Filed**.
- **Display by Entered Date** - Click the radio button **Entered**.
- **Display by a Range of Dates** - Enter a specific date range or leave blank to display all claims filed in the case.
- **Sorted By** - Reports may be sorted by two criteria. Click the down arrow to the right of the field and display list.

Step 2 Click on **Report** to continue or **Clear** to reset the search criteria. The **Claims Register** appears:

- Step 3** To print register, click on **Print** button from the browser toolbar.
- Step 4** To view a claim, click on the Claim number hyperlink. The PACER Service Center Transaction Receipt will appear reflecting the number of pages that will be billed to your PACER account. Click **View Document** to continue.

IMPORTANT NOTE

Depending upon the case type, claims may not be docketed to the register.

Claims in Chapter 7 no asset cases are not docketed to the Claims Register. Chapter 7 asset claims are docketed after the deadline to file has past.

Chapter 13 Claims are docketed as they are filed and Chapter 11 claims are docketed upon request.

Docket Report

The Docket Report allows the user to view and print a listing of all events docketed to a specific case.

- Step 1** Select Reports from the Main Menu, click on Docket Report hyperlink from the Reports menu. The **Selection Criteria** screen appears and allows the user to specify what information to include in the report.

Note: If you are not already logged into PACER, you will be asked to enter your PACER login and password to view case information.

Selection Criteria include:

- **Case Number** - Click in the box and enter the correct case number (yy-nnnnn) or (yy-nnnn) including the hyphen.
- **Filed** - Click on the radio button to sort docket text using the Filing date.
- **Entered** - Click on the radio button to sort docket text using the Entered date. *After selecting the date type to be displayed, you have the opportunity to enter a date range for the docket to display. Leave blank to display all docket entries or click in the box and enter a specific start and*

end date range.

- **Documents** - Leave blank to display all documents or enter a beginning and ending number range for docket to display.
- **Include Terminated Parties** - Click in the box to have the docket display terminated parties.
- **Include Links to the Notice of Electronic Filing** - Click in the box to allow access to notice of electronic filing for certain documents. *(The Notice of Electronic Filing will reflect those parties who are receiving electronic notifications in the case.)*
- **Sort By** - Click the down arrow to the right of the box to select how the docket is to be sorted.

Step 2 Click on **Run Report** to continue or **Clear** to reset search criteria. The **Case Docket Sheet** screen appears.

Note: Use the scroll bar to the right of the screen to move the docket sheet up or down.

Step 3 To print the docket, click on **Print** button from the browser toolbar.

Step 4 To **view a specific document**, click on the document number hyperlink. The Pacer Service Center Transaction Receipt will appear reflecting the number of pages that will be billed to your PACER account. Click **View Document** to continue.

Step 5 To view the Notice of Electronic Filing, click on the bullet next to the docket number hyperlink.

- Click the appropriate radio button to **Select Receipt Type**
- Click **Display Receipt** to continue or **Clear** to re-select receipt type.

Step 6 The **Notice of Electronic Filing** screen appears.

- To print click **Print** button from browser toolbar.

Creditor Mailing Matrix

The Creditor Mailing Matrix report displays the list of creditors for a specific case.

The list contains those creditors uploaded at case opening and may or may not include parties that have filed/docketed a pleading to a case. All of the creditors on this report were added through the Creditor Maintenance Option of the ECF System and used by the Bankruptcy Noticing Center (BNC) for court generated notices.

Step 1 Select **Reports** from the Main Menu, click on **Creditor Mailing Matrix** hyperlink from the Reports menu. The Selection Criteria screen appears.

Note: You will be asked to enter your PACER login and password to view case information if you are not already logged into PACER.

- Enter the case number
- Click to select the appropriate **Format** radio button
- Click **Run Report** or **Clear** to reset the search criteria

Step 2 **Search Results** screen will appear listing creditors for the specified case.

Step 3 To print, click on the **Print** button from the browser toolbar.

Utilities

Utilities permit you to manage your interactions with the ECF System.

Change Your Client Code

Allows entry of a new client code, used for reporting charges made to the current PACER account.

Step 1 Select **Utilities** from the Main Menu, click on **Change Your Client Code** hyperlink from the Your Account menu.

- System will display current value of the client code if you used a client code upon logging into PACER.
- Enter a client code.

Step 2 Click on **Submit** to continue or **Clear** to reset.

Step 3 System will display the new value of the client code; to continue click on Main Menu option of your choice.

Change Your PACER Account

Displays the login screen to allow entry of a different PACER account. The new account can be designated as the default PACER login.

Step 1 Select **Utilities** from the Main Menu, click on **Change Your PACER Account** hyperlink from the Your Account menu. PACER Login screen appears.

- Enter PACER login, password and client code, if applicable.
- Click box to make this login your default PACER login.

Step 2 Click on **Login** to continue or **Clear** to reset.

Maintain Your ECF Account

This function allows you to update your personal information and instructions about E-mail notification.

Step 1 Select **Utilities** from the Main Menu, click on **Maintain Your ECF Account** hyperlink from the Your Account menu. The Maintain User

Account screen appears.

- Step 2** Make appropriate changes or additions to your name, address, telephone number and/or fax number.
- **E-mail information** button allows you to specify how you want to be notified of ECF filings and the E-mail address at which you want to receive notification, see Step 3.
 - **More user information** button allows you to change your login name or password, see Step 4.
 - Click on **Submit** button upon completing all changes/additions.
 - Click on **Clear** button to clear changes you may have made.
- Step 3** Upon clicking E-mail Information button, the E-mail information for your account screen will appear.
- **Primary e-mail address** - specify the complete address.
 - Send the notices specified below - select one or both options.
 - **to my primary e-mail address.**
 - **to these additional addresses** and add additional E-mail addresses in text box.
 - To receive notices for a case in the Massachusetts District in which you are not involved, check the box for **Send notices in these additional cases** and key the case number(s) in the text box.
 - Select appropriate radio button to receive notice of electronic case filing for each case (**Send a notice for each filing**) or a summary report containing all cases (**Send a Daily Summary Report**).
 - **Format notices** - select appropriate format.
 - **html format** for Netscape, Microsoft Explorer or ISP e-mail service.
 - **text format** for cc:Mail, GroupWise, other e-mail service.
 - Click on **Return to Account** screen to continue making changes to your account and/or to submit changes once completed.

- Click on **Clear** button to clear changes you may have made.

Step 4 Upon clicking the **More user information** button, more information from your account will appear.

- **Login** - you may change your login.
- **Password** - you may change your password.

Note: When you type a new password, it is readable. Whenever this screen is displayed again, the password will be hidden.

- Click on **Return to Account** screen to continue making changes to your account and/or to submit changes once completed.
- Click on **Clear** button to clear changes you may have made.

Step 5 After making appropriate changes/additions and clicking on the **Submit** button, the system will display all cases you are involved in.

- **Update All** - default selection, click **Submit** button to have address information spread to all cases.
- To have address update spread to specific cases but not all, hold down <Ctrl> Key on keyboard while clicking on specific cases.
- Click on **Submit** button to update your account.
- Click **Clear** button to clear selection.

Step 6 After clicking **Submit** button the system will display updated information, to continue click on Main Menu option of your choice.

Review Billing History

Displays the number of ECF pages accessed and charges incurred for the PACER account currently being used. If you enter client codes each time you access the ECF System, the charges are totaled for each code.

Step 1 **Select Utilities** from the Main Menu, click on **Review Billing History** hyperlink from the Your Account menu.

-
- Step 2** **Transactions dated:** - enter a date range for the report to display.
- Step 3** **Sort:** - click the down arrow to the right of the box to select how you would like the report to sort.
- Date range.
 - Client code/Date.
- Step 4** Click on **Submit** to continue or **Clear** to reset display criteria. Billing history will display.
- Click **Back** to return to the Utilities Main Menu or you may click on the Main Menu option of your choice.

View PACER Account Information

Displays the current PACER login and client code, if applicable.

- Select **Utilities** from the Main Menu, click on **View PACER Account Information** hyperlink from the Your Account menu. System displays the account information and client code, if applicable, used to log into PACER; to continue click on Main Menu option of your choice.

View Your Transaction Log

Displays details of all transactions (*docketing*) that the current user has entered into ECF for a specified time period.

- Step 1** Select **Utilities** from the Main Menu, click on **View Your Transaction Log** hyperlink from the Your Account menu. View Transaction Log screen appears.
- Click in the dialog boxes of **Start Date:** and **End Date:** and type the dates of report you want displayed.
- Step 2** Click on **Submit** after completing date selection or **Clear** to reset search criteria. The Transaction Log screen appears.
- Step 3** To print transaction log, click on **Print** from browser toolbar.
- Step 4** To continue, click **Main Menu** option of your choice.

Make a Credit Card Payment

- Step 1** Under Utilities, Click on **Internet Payments Due**.
- Step 2** A payment box will appear. Click on the **Pay Now** button.
- Step 3** You will be prompted to enter your credit card information.
- Step 4** It may take some time, but a box will appear with a receipt number for you. Any payment due to the Court will be paid.